

MOCKINGBIRD



**RAW
PRESS**

FOR PUBLICATION

SMOOTHIES *worth*
paying **MORE** *for*

CLIENT: MOCKINGBIRD RAW PRESS

DBA DESIGN EFFECTIVENESS AWARDS ENTRY

NOVEMBER 2023

B&B

EXECUTIVE SUMMARY

This is the tale of how Mockingbird Raw Press - a small but mighty new brand creation – has reshaped the UK smoothie category with its premium cold-press products. Founded as a start-up, and created by a single design agency with no consumer testing, Mockingbird has successfully disrupted the dominance of smoothie market giants Innocent and Naked, owned at the time of launch by the global corporations Coca-Cola and PepsiCola respectively, becoming the no 1 contributor to overall category growth*.

In a David vs two Goliaths story, Mockingbird's signature Raw Greens product is now the no.1 selling smoothie in Sainsbury's, Morrison's, Waitrose and Co-op** – despite being priced between 49% and 65% higher than those two core branded competitors – and the Naked brand has since been delisted in both Co-op and Waitrose.

Design has played a crucial role in this success. By creating a brand that consumers understand is worth paying more for, the design has empowered Mockingbird's strategy of introducing a premium tier into grocery and of reshaping the category into a good, better, best model.

HERE ARE MOCKINGBIRD'S HEADLINES:

- **RAPID SALES GROWTH FROM REDACTED CONFIDENTIAL DATA**
- **SMASHED YEAR ONE SALES TARGETS BY 39%**
- **IS MORE THAN DOUBLING BRAND GROWTH YEAR ON YEAR**
- **IS THE UK'S FASTEST-GROWING SMOOTHIE BRAND**



* Nielsen, Total Coverage/GB, Smoothies, % Value Chg v YA, Data MAT to 09.09.23, Min.5% numeric distribution

** Nielsen, 750ml branded smoothies, cash rate of sale, data 12 w/e 26.08.23

CONTEXT & OVERVIEW

PROJECT BRIEF

Mockingbird juices and smoothies are cold-pressed, which means that they are processed differently to the average supermarket smoothie. This non-thermal processing keeps the nutritional integrity of the raw fruit and vegetables intact for superior taste and health credentials - a claim its pasteurised competitors cannot make.

By bringing the superior product credentials of a high street juice bar into the supermarket space, Mockingbird sought to make quality smoothies more accessible, while also creating a premium smoothie tier within grocery at an elevated price point.

There was, however, one major problem with this strategy. REDACTED CONFIDENTIAL DATA, 66% of consumers claimed they would not pay more for cold-press. REDACTED CONFIDENTIAL DATA, every other cold-press smoothie brand that has entered the UK grocery market has remained niche.

It was clear that in a market already associated with freshness, purity and health, credibly communicating the additional benefits of cold-press to consumers was a challenge that had yet to be met. **And so this became the brief: to create the brand positioning, name, visual identity and packaging design for a new smoothie brand that can clearly articulate the benefits of cold-press to consumers, and encourage them to pay more for it.**

THE BUSINESS OBJECTIVES OF THE BRIEF WERE:

1. ACHIEVE FIRST YEAR VALUE SALES OF REDACTED CONFIDENTIAL DATA.
2. WIN A NATIONAL SUPERMARKET LISTING IN YEAR ONE.
3. CONTINUE TO DOUBLE THE SIZE OF THE BRAND YEAR ON YEAR.

...ALL AS PART OF AN OVERARCHING STRATEGY TO:

4. DISRUPT THE SMOOTHIE CATEGORY WITH A PREMIUM COLD-PRESS OFFER THAT'S WORTH PAYING MORE FOR.

SCOPE OF WORK

B&B Studio undertook this new brand creation from scratch without consumer testing, crafting the brand's positioning and creative strategy; creating the Mockingbird name, messaging and tone of voice; and designing its visual identity, packaging and brand world.



DESCRIPTION

Working out how to successfully communicate the cold-press difference to consumers was key to the creative strategy, as this would be the reason for its premium price point. An audit of existing cold-press smoothie brands showed that the typical approach to describing the process was factual and functional, and failed to connect emotionally – there was a clear opportunity to do things differently. REDACTED CONFIDENTIAL DATA, the strategy aligned the product benefits of the cold-press process with a bigger philosophy on life that brought richness to the brand. The story also led to the brand name, inspired by the novel 'To Kill A Mockingbird' (where to do so is a sin because they do no harm).

With a compelling brand and product story in place, the design needed to underpin the premium credentials of cold-press. Rather than look to the existing smoothie category that had become increasingly generic, the design was inspired by analogous craft categories where process is celebrated, including cold brew coffee and craft spirits. By borrowing these craft codes, the design successfully creates the first 'craft smoothie' and brings a whole new design language to the category that instantly denotes product quality and premium status. By balancing high quality codes with a welcoming personality, the design hits the sweet spot of premium, yet accessible.



Launching into the commoditised smoothie category, Mockingbird offered something that looked and felt entirely new. Curious consumers soon discovered the cold-press difference, clearly articulated on pack and, despite its price premium, have made Mockingbird the category's fastest growing brand, and the number one raw (cold-press) smoothie brand in the UK.*

**Nielsen, Total Coverage/GB, Smoothies, % Value Chg v YA, Data MAT to 09.09.2023, Min.5% numeric distribution*

OVERVIEW *of* MARKET

At the time of Mockingbird's launch (September 2020), the UK smoothie market was dominated by two brands – Innocent and Naked, owned by the global corporations Coca-Cola and PepsiCo respectively – who together made up 81% of the market (Nielsen). Private label accounted for a further 18.3%, while the remaining 0.7% was made up of smaller, more niche brands, including other cold-press offerings. (Naked is no longer fully owned by PepsiCo with private equity PAI Partners becoming a majority shareholder in 2021).

The category has become increasingly commoditised in recent years with all brands positioned around the same generic consumer drivers of health and convenience, while offering essentially the same range of products and taste profiles. On average, 80% of all volume is sold on promotional deals, diluting profitability for both brands and grocers, and restricting the ASP (average sales price) of the category.

According to Nielsen, growth of the total smoothie category in value terms has been steadily slowing – from +12.4% in the year to September 2021 to +5.1% in the year to September 2022 to +2.0% in the year to September 2023 – while in volume terms the category shrank by 5.3% in the year to September 2023*.

In this declining category, Mockingbird took the brave step of introducing a bold and unexpected brand design with the aim of reshaping the market. By creating and owning a premium tier through craft category design codes and creative storytelling, Mockingbird has successfully redrawn the category into a good (Private Label), better (Innocent/Naked), best (Mockingbird) model that has forced the two 'better' brands to fight each other for their position on shelf.

KEY FACTS

MOCKINGBIRD RAW PRESS LAUNCHED IN SEPTEMBER 2020.

DESIGN FEES WERE REDACTED CONFIDENTIAL DATA.

** Nielsen, Total Market, Total Smoothies, October 2021 – September 2023, Total Value & Volume Sales*



RESULTS

OBJECTIVE 1. ACHIEVE FIRST YEAR VALUE SALES OF REDACTED CONFIDENTIAL DATA.

As a completely new start-up brand with zero market share, Mockingbird still had big ambitions, REDACTED CONFIDENTIAL DATA (for context, brand leader Innocent who made up 57.6% of the market achieved £141.1m retail sales in 2021). With total value sales of REDACTED CONFIDENTIAL DATA, the brand smashed this optimistic target by 39.1%.

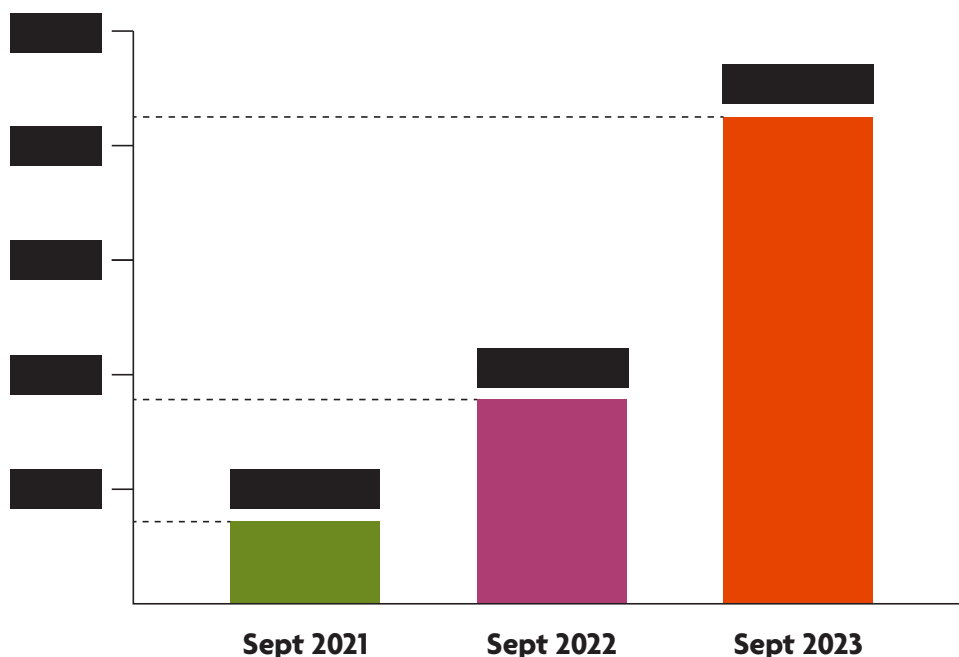
OBJECTIVE 2. WIN A NATIONAL SUPERMARKET LISTING IN YEAR ONE

With a strategy based on reshaping the category, Mockingbird needed a national grocery listing, and achieved this aim at the outset by securing a deal to launch exclusively in Waitrose. But that wasn't all - within that first year, Mockingbird had also won a listing with Sainsbury's, as well as branching out into Selfridges and Wholefoods. As of October 2023, Mockingbird is available in all the major grocers (Tesco, Sainsbury's, Asda, Waitrose & Morrisons), as well as a host of convenience accounts (Co-op, Nisa, Costcutter, WHSmith & Sainsbury's Local) plus a number of high-end independents (Selfridges, Planet Organic & Wholefoods). The brand's unusual ability to sit on the shelves of both Asda and Selfridges speaks to the quality of the design and the success of its 'premium accessible' positioning.

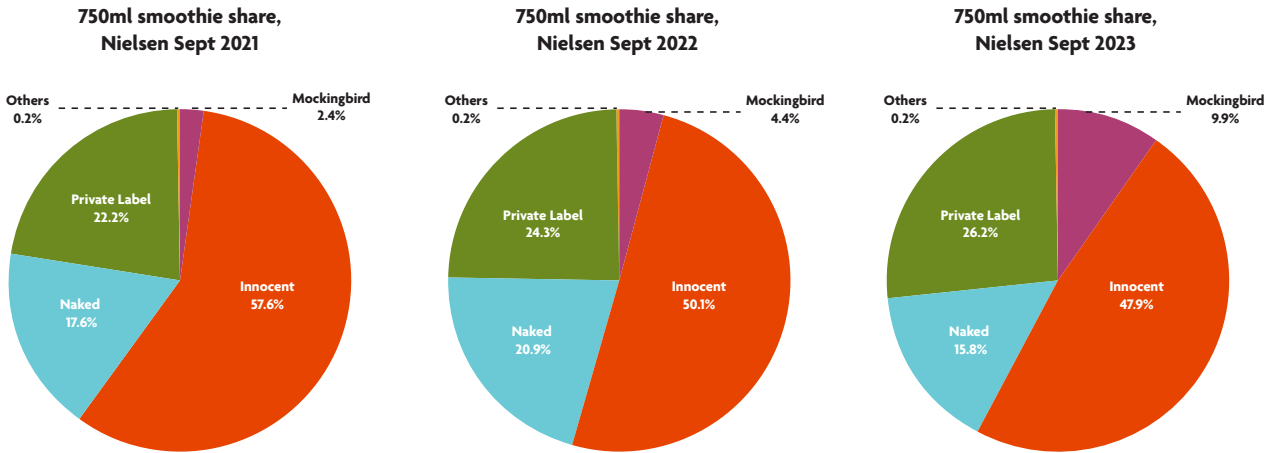
Distribution keeps on growing. Mockingbird's original target for 2023 was to reach 10,000 distribution points (total number of facings in store) – a figure already achieved by the end of March. As of October 2023, the brand has amassed 15,000 distribution points.

OBJECTIVE 3. CONTINUE TO DOUBLE THE SIZE OF THE BRAND YEAR ON YEAR

Mockingbird launched with the bold ambition of doubling the size of the business year on year and is continuing to achieve this goal. Despite an unexpectedly strong first year, REDACTED CONFIDENTIAL DATA, Mockingbird was able to increase sales by 158% in year 2, then again by 136% in year 3. Mockingbird has achieved enviable growth for a start-up, from REDACTED CONFIDENTIAL DATA.



This strong and steady growth is making an impact in terms of Mockingbird's market share. While Mockingbird's slice of the 750ml market has increased from 2.4% in September 2021 to 4.4% in September 2022 (a gain of 83%) to 9.9% in September 2023 (a further gain of 125%), the major players Innocent and Naked have seen a clear decline, suffering a 16.8% loss and a 10.2% loss respectively over that two-year period.



**OBJECTIVE 4.
DISRUPT THE SMOOTHIE CATEGORY WITH A PREMIUM COLD-PRESS OFFER
THAT'S WORTH PAYING MORE FOR**

All Mockingbird's commercial successes have been enabled by the brand's strategy to reshape the smoothie category with a more expensive offering – a strategy that depended on design that could clearly communicate that this is a brand that's worth paying more for.

MAINTAINING A STRONG AVERAGE SALES PRICE

With little to choose between the brands on shelf, the smoothie category had become commoditised, with 80% of volume sold on promotional deals, and many consumers buying solely on price, regularly switching between Innocent, Naked and private label (Dunnhumby). With its premium design and cold-press credentials, Mockingbird has reset this standard, launching with an average sales price REDACTED CONFIDENTIAL DATA higher than its competitors for its 750ml SKUs and selling just REDACTED CONFIDENTIAL DATA of volume on promotion. In fact, in the year to September 2023 with all promotions taken into account, Mockingbird's average sales price for its 750ml SKUs was REDACTED CONFIDENTIAL DATA compared to Innocent REDACTED CONFIDENTIAL DATA, and a whopping REDACTED CONFIDENTIAL DATA compared to Naked REDACTED CONFIDENTIAL DATA - proving that consumers believe this is a brand worth paying more for and are willing to make that choice. Despite its price premium, Mockingbird's signature Raw Greens product is now the no.1 selling smoothie in Sainsbury's, Morrison's, Waitrose and Co-op (other green smoothies are available).



DRIVING INCREMENTAL GROWTH

That Mockingbird has brought something visibly new and different to the category is underscored by its ability to attract new consumers to the smoothie aisle - particularly in Tesco, where the brand scored an incredible REDACTED CONFIDENTIAL DATA accretion rate (where REDACTED CONFIDENTIAL DATA of sales are by consumers new to the category). In a landscape where 20% accretion is deemed impressive, this statistic is exceptional. This success was echoed in Sainsbury's, where Mockingbird achieved accretion of REDACTED CONFIDENTIAL DATA. As the concept of smoothies is not in itself new, these figures suggest that consumers had grown tired of the category in recent years but have been attracted back by the promise of something better, more premium, and clearly more desirable – attraction that can have only been driven by the power of the new branding.

EXTENDING THE RANGE

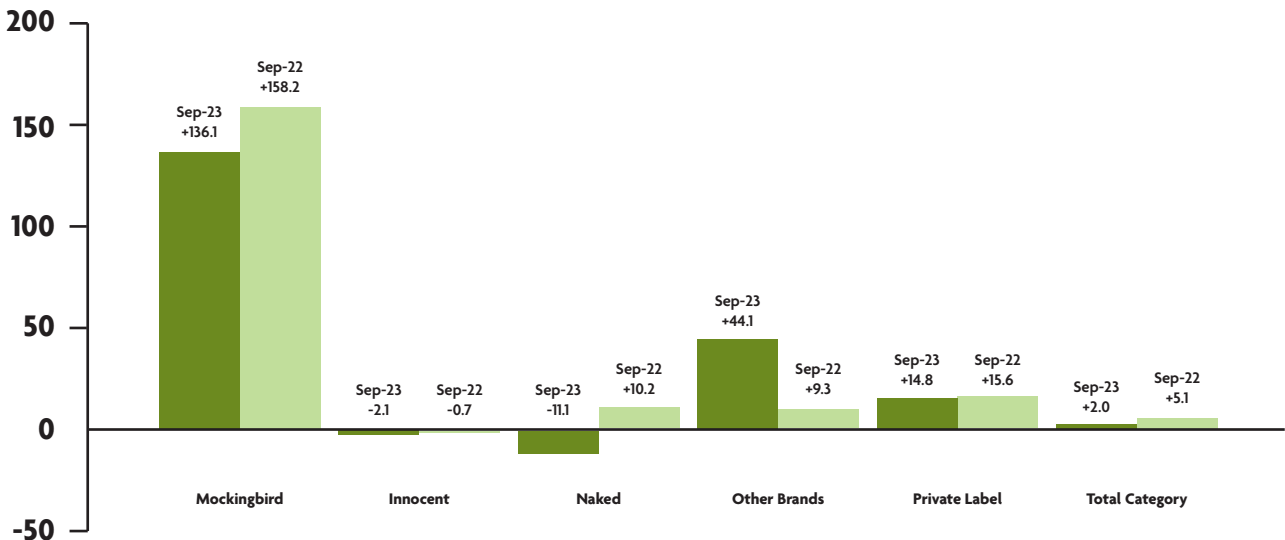
Mockingbird's success among consumers has enabled the business to extend the brand more quickly than anticipated, with retailers asking for more ranges and SKUs. The smoothie range has been extended with two new flavours, and the brand has entered into the juice category with a range of four flavours that are showing positive early performance data. At the time of writing, a new range of shots is due to launch in Waitrose.

OUTPERFORMING THE MARKET & COMPETITORS

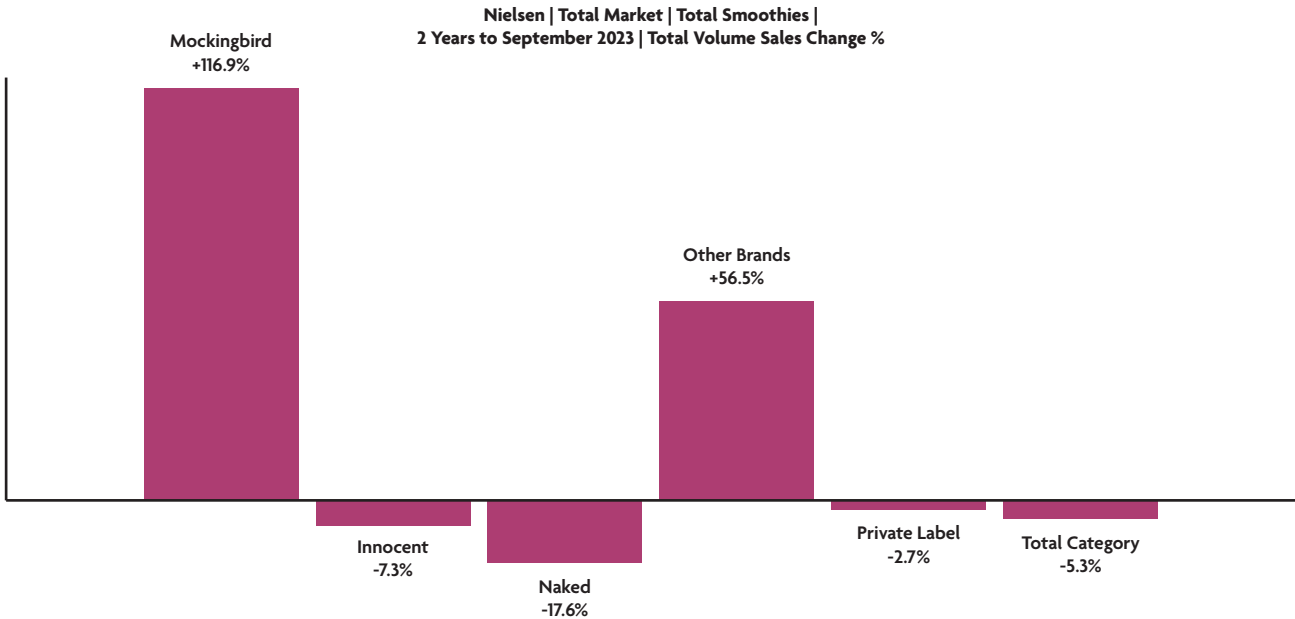
While Mockingbird is still a small brand in comparison to long-standing smoothie giants Innocent and Naked, who have been on the UK market since 1998 and 2007 respectively (Naked was founded in the US in 1983), it is a truly disruptive force in the category and has been the main driver of value growth for the past two years. Mockingbird's value sales grew by +158.2% in the year to September 2022 and +136.1% in the year to September 2023, while Innocent has seen its value sales decline for two consecutive years, and Naked experienced double digit value sales decline in the year to September 2023.



Nielsen | Total Market | Total Smoothies | 2 Years to September 2023 | Total Value Sales Change %



Mockingbird's value sales figures aren't just due to its high average sales price either. In the year to September 2023, Mockingbird showed 116.9% growth in volume terms, in a category that shrank by 5.3% with Innocent, Naked and Private Label all contributing to that decline.



RESHAPING THE CATEGORY

Mockingbird's strategy to reshape the category and insert itself as the go-to premium brand is succeeding by stealth. As of 2023, market dynamics are being driven by Mockingbird and private label, with mid-tier brands struggling to find a differentiated role. As a result of these shifts, both Co-op and Waitrose have taken the decision to delist Naked, retaining Mockingbird and Innocent alongside private label smoothies in order to offer consumers a clear and simple good, better, best system. This acceptance among buyers and consumers of newbie Mockingbird as the premium brand in the category just couldn't have been achieved without exceptional premium design and the compelling communication of its cold-press benefits.



COLD-PRESSED
for
**TASTE &
NUTRITION**

FURTHER IMPACT & ACHIEVEMENTS

Mockingbird's impact goes beyond commercial achievements, and the brand's success is empowering the business to live and breathe its values.

GROWING A PASSIONATE TEAM

Mockingbird's strong sales have enabled the business to grow faster than anticipated, doubling from an original team of four at the time of launch, to a business of eight people today.

WINNING INDUSTRY AWARDS

Mockingbird was one of The Grocer's finalists for Soft Drinks Brand of the Year 2023. It has won six Great Taste Awards across its product range, as well as recognition by both the Nourish Awards and the Veggie awards.

IMPACTING SOCIAL HEALTH

With a higher percentage of vegetables in its smoothie products and lower rates of sugar (on average 20% less), Mockingbird's smoothies have been strongly health accretive to the category.

MEETING THE HIGHEST ETHICAL STANDARDS

All Mockingbird products are manufactured at a B.Corp-certified factory, ensuring that every aspect of production meets the highest standards of environmental and social responsibility.

REDUCING ENVIRONMENTAL IMPACT

Mockingbird is continually looking for ways to reduce its environmental impact, and moved to 50% recycled plastic bottles in 2022, as well as transitioning to 'wash-off' glue labels to drive stronger efficiencies in the recycling process. The brand will also be implementing 'hinged' caps during 2024 to prevent plastic lids ending up in the ocean. From a logistics standpoint, the brand is currently working to halve its CO2 emissions through a pallet reconfiguring project.



INFLUENCING FACTORS

MARKETING ACTIVITY & SPEND

As a new and independent brand, Mockingbird has a limited marketing budget in contrast to its key competitors who have access to a host of internal marketing specialists and external agencies. The brand has not invested at all in social media and manages its own posting, typically featuring the product and packaging.

Mockingbird does invest in out-of-home advertising in London to build brand and product awareness. The posters simply feature an image of the product in its packaging, harnessing the brand design to sell the product on the street just as it sells it in-store. It is worth noting that while this campaign only appears in London, Mockingbird's sales are consistent across stores nationwide. The brand will spend REDACTED CONFIDENTIAL DATA in out-of-home advertising in 2023.



SALES PROMOTIONS

As mentioned, 80% of the category is sold on promotional deals, while Mockingbird has consistently sold at a higher average sales price and undergone fewer price promotions REDACTED CONFIDENTIAL DATA. Mockingbird has successfully used design to create a brand that consumers understand is 'worth paying more for', and this is attracting retailers to the brand as it brings them more value for their shelf space.

